

# eWallet

## Users Guide and Reference

*for Windows PC*

Version 8.1

**Ilium Software**



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# **eWallet: Users Guide and Reference**

Ilium Software

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# Chapter 1. eWallet Overview

## 1.1. Welcome to eWallet!

Welcome to Ilium Software's eWallet<sup>®</sup>, the award-winning way to safely and conveniently store your important, confidential information on your Windows PC, Mac, Android device, Windows Mobile-based phone, iPhone, iPod touch, iPad and BlackBerry device.

This manual contains documentation for many of the features and functions of Ilium Software's eWallet for Windows PC (desktop, laptop, netbook, or ultra-mobile).

You can also find *step-by-step instructions* for using many of eWallet's features in the online **eWallet Tutorials**. You can open the eWallet Tutorials by clicking the **Help Center** button in the upper right corner of the Windows PC version of eWallet.

Thank you for choosing eWallet.

## 1.2. Supported Platforms

eWallet is supported on the following platforms:

- Windows<sup>®</sup> PC running Windows 8 (Desktop mode) and Windows 7.
- Windows<sup>®</sup> Store running Windows 8.1 or Windows RT 8.1.
- Apple<sup>®</sup> Mac<sup>®</sup>, OS X<sup>®</sup> 10.7 and higher.
- Apple iPhone<sup>®</sup>, iPad<sup>®</sup> and iPod touch<sup>®</sup>, iOS 7 and higher.
- Android<sup>™</sup> 4.0.3 to 5.x.
- RIM<sup>®</sup> BlackBerry<sup>®</sup> OS 7 and BlackBerry 10 (the Android version of eWallet runs on compatible BlackBerry 10 devices).
- Windows Mobile<sup>®</sup> 6 and Windows Mobile 6.1 and 6.5 Classic, Standard (non-touch) and Professional (touch). Windows Mobile 6.5 devices are also known as *Windows phones*.
- Windows Mobile 5.0 Pocket PC (touch)
- Windows Mobile 5.0 Smartphone (non-touch)

## 1.3. How to Use this Document

You can either read through this document, or use it as a reference by looking up the particular features that you want in the Table of Contents or Index. The section **Getting Started with eWallet (page 3)**, contains basic instructions for using eWallet.

**Using eWallet** contains detailed information about all of the features and functions of eWallet.

If you'd like *step-by-step instructions* for using many of eWallet's primary features, check out the online eWallet Tutorials. The eWallet Tutorials are available by clicking the **Help Center** button in the upper right corner of eWallet on the Windows PC.

Ilium Software, the makers of eWallet, are committed to providing both high-quality software and excellent technical support.

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## Chapter 2. Getting Started with eWallet

Ilium Software's eWallet® is an electronic wallet for your most important personal information (credit cards, calling cards, passwords, PINs, account numbers and more). Like a real wallet, eWallet keeps your information in **cards**. You can have several related pieces of information on a card. For example, on a password card, you might have a username, a password and a URL. You can also personalize cards with *icons, colors, and pictures*.

To help keep your cards organized, the cards you create are stored in **categories**. Wallet files can have many different categories, and you can put any kind of card in any category. In addition, you can **nest** categories, allowing you to place categories within categories. Like you do with files in folders on your Windows PC, you can organize your eWallet cards and categories however makes the most sense to you, and change how you have them organized as needed.

You can have as many different **wallets** as you want, and keep different information in each one. For example, you might want to have a personal wallet file for your own cards, but an office wallet file that you share with an assistant or other members of your team. You can place copies of the same cards in different files as appropriate. For example, you might want your business credit card listed in both of your wallet files for extra convenience.

You should protect your wallet file with a **password**. With a password protected wallet you must enter the wallet's password before you can see the information on any of the cards in that wallet. We recommend that you password-protect all of the wallets that you keep important personal information in.

You can also choose to have a wallet that does not use a password. Anyone can open a wallet that does not use a password. We *strongly* recommend that you set a password for any wallet that contains personal information.

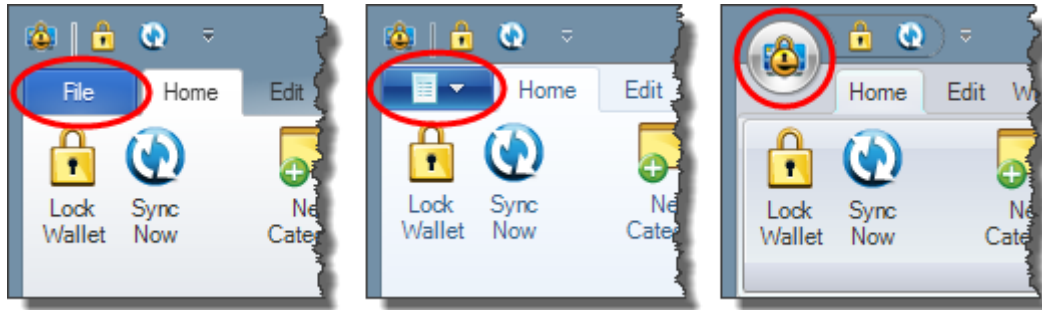
More detailed information about passwords, wallet files, categories, and cards is found in the sections below.

### 2.1. Starting eWallet

When you start eWallet for the first time, you'll be prompted to create a new wallet file to store your information in. The default file name is My Wallet.wlt and it is stored in your My Documents folder.

When you're ready to add your own information, you can add new categories and cards to wallet and organize the information in a way that fits your needs.

The File/Start tab at the top of eWallet will look different depending on which Ribbon style you have selected. Although the tab may have different appearance, its function is the same.



The File/Start tab with Ribbon Style set to Office 2013/2010, Windows 7, and Office 2007 (left to right)

## 2.2. Adding Your Own Cards

Cards in eWallet are just like the cards you carry in your real wallet. Create cards for each of the important pieces of information you want to carry with you.

Select the category you would like to add a card to, and then click the **New Card** button on the **Home** or **Edit** ribbons.

When adding a new card, eWallet will prompt you to select a *type* of card. After that, you can enter the specific information that you want to appear on the card.

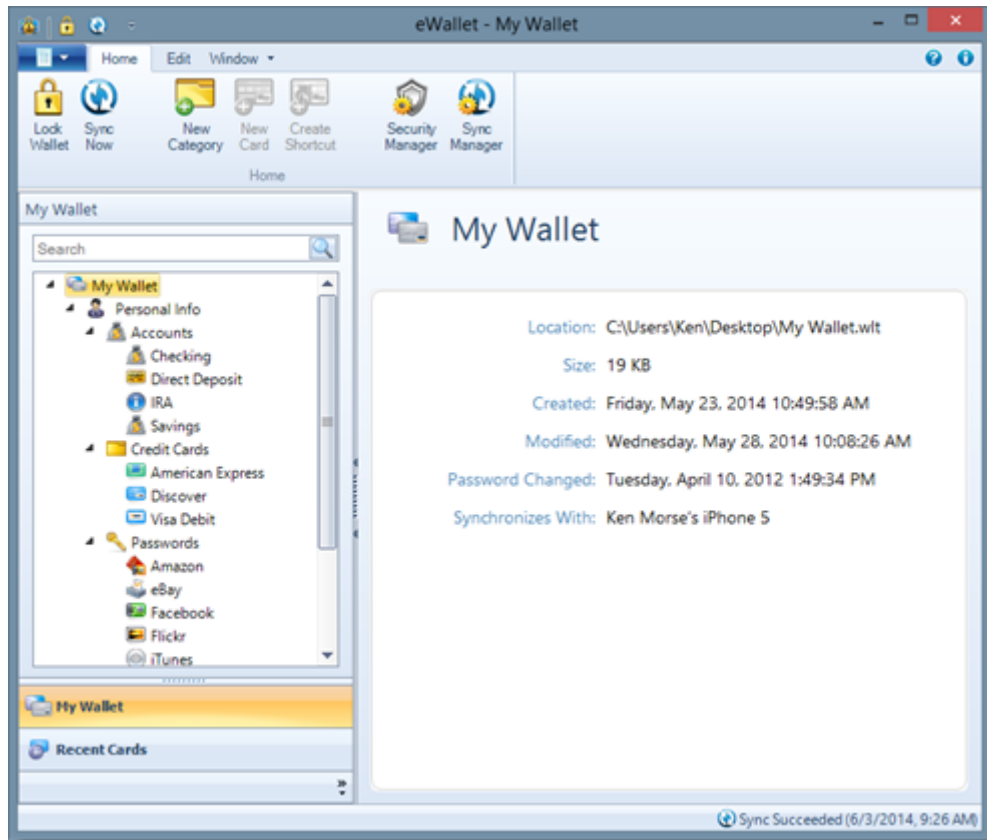
eWallet gives you many options for personalizing your cards. The way you access these options vary depending on the device you are using.

When creating a new card, or editing an existing card, select the **Design** or **Edit Fields** ribbons to access features that let you personalize your cards.

## 2.3. Changing and Deleting Cards

You can make changes to an existing card at any time.





Click on the card in the Card List that you wish to edit, and then select the **Edit Fields** ribbon. As a shortcut, you can also double-click on a card face to edit your information. To change the appearance of a card, click on the card and then select the Design ribbon.

You can also delete cards that you are no longer using.

In the Card List, right click on the card you want to delete and select Delete from the context menu.

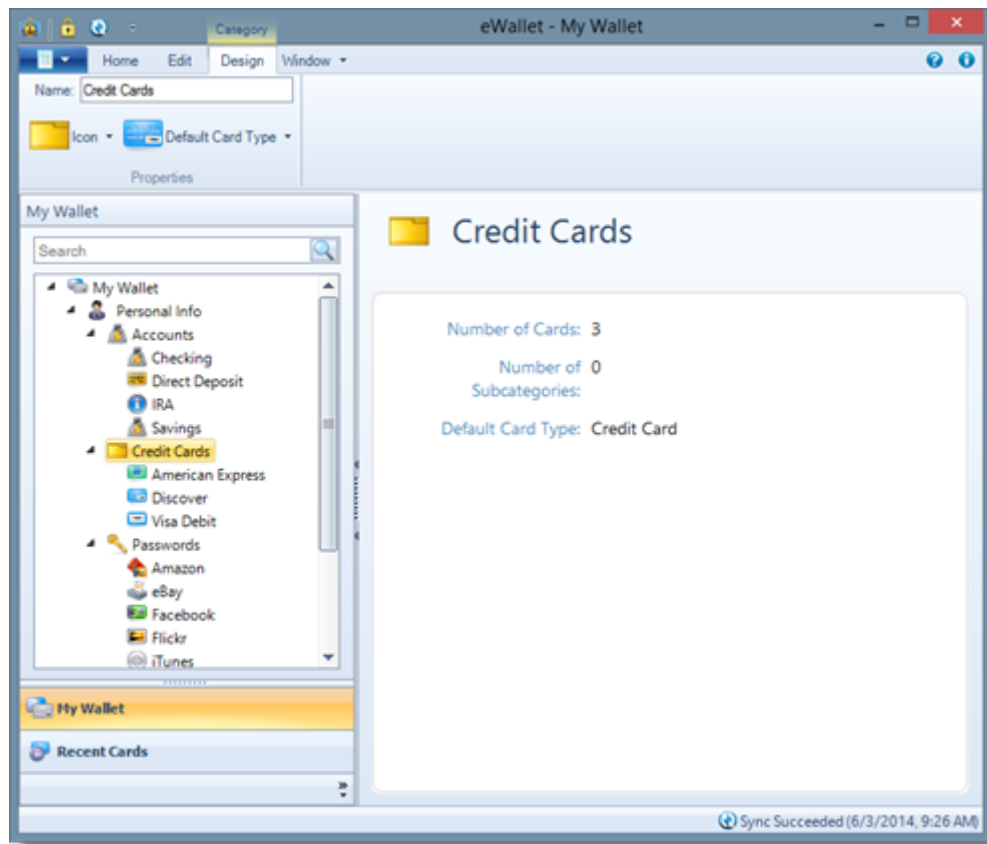
## 2.4. Adding, Changing and Deleting Categories

It's just as easy to add, delete and change your eWallet categories as it is for cards. To add a **new category** to eWallet:

Click the **New Category** button on the **Home** or **Edit** ribbons.

You might also need to **change an existing category**, perhaps to give it a new name or change the icon. You might also want to **delete a category** you are no longer using. Editing a category doesn't change the card it contains, but deleting a category deletes all the cards in that category as well.

To change a category, click on the category in the Card List and then select the **Design** ribbon. To delete a category, click on the category in the Card List and then click the **Delete** button on the **Edit** ribbon.



You can change the **name** of a category and the **icon** associated with it. **Default Card Type** lets you select the default card type selected when you create a new card in that category. You can always change the card type for the new card, and you're not required to have all the same types of cards in a category. This just controls the default type eWallet selects when you make a new card. You can still pick any of eWallet's available card types from the list when creating a new card, regardless of the default type for the category.

## 2.5. Nested Categories

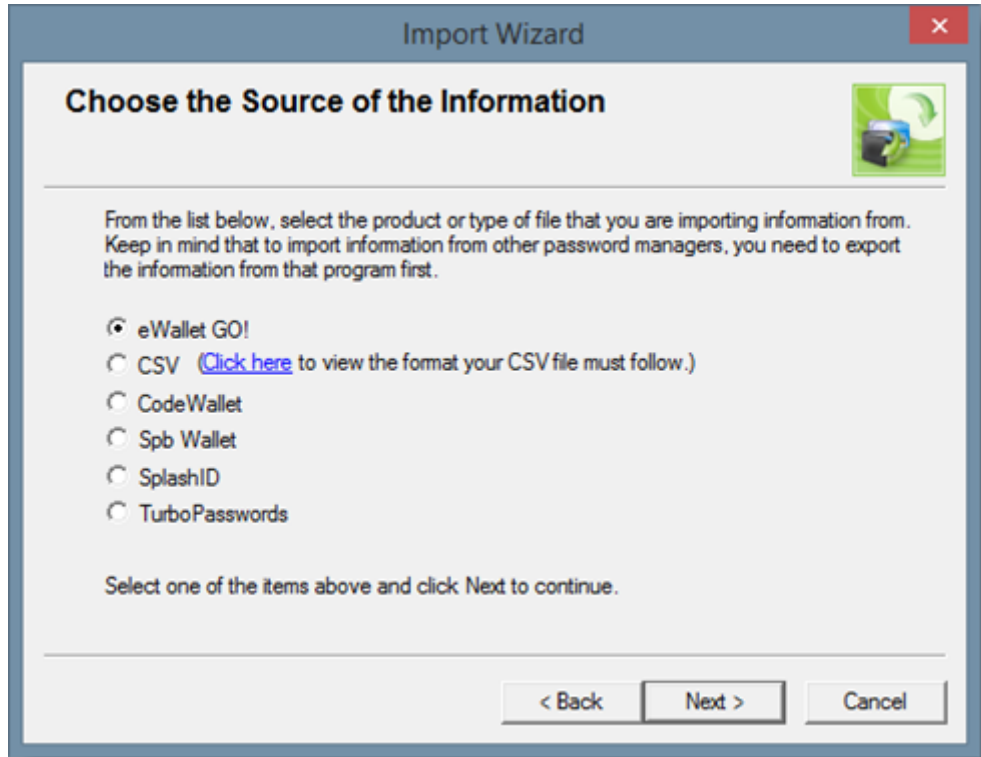
eWallet allows you to further refine your card organization with nested categories. Similar to the way folders can contain other folders on your Windows PC, categories can contain other categories, or subcategories. Subcategories allow you to keep similar types of information in one place (Credit Cards,) but also organize them in a way that's useful to you (Business and Personal.)

Click on a category in the Card List where you want to create the subcategory, and then click the **New Category** button on the **Home** or **Edit** ribbons. To make an existing category a

subcategory on your Windows PC, simply drag the category onto another category. The category you dragged becomes a subcategory of the category it is dropped on.

## 2.6. Import Wizard

eWallet's Import Wizard will help you import information into eWallet that's currently in a different electronic wallet product's format. The Import Wizard currently imports information from files made by our own eWallet GO!® product as well as: CodeWallet, SPB Wallet, SplashID, TurboPasswords (Cloak), and CSV format.



To use the Import Wizard, first export your information from one of the above programs. Then, open eWallet on your Windows PC, click the **File/Start** button in the upper left corner of eWallet, and select **Import** from the menu. The wizard will walk you through the entire process.

Remember that the Import Wizard will not import information directly from your current program's data file; you'll need to export the information first. Also, the Import Wizard is only available on the Windows PC version of eWallet - not a mobile device version. Once you import your information into eWallet, however, you can easily synchronize the information to your mobile device.

The Import Wizard will first try to match each of your cards to one of the eWallet card types. You'll be given the option to change the card type of each card: if you want to use the type eWallet has selected; just click **Import Card**.

Once you've confirmed all the cards, the Import Wizard will import all of the information from your file into new cards. Wherever possible, the Import Wizard will match your existing info with the fields in the eWallet. If the Import Wizard can't find a good match for any specific fields, it will put the information for that field into the **Notes** area of the card. All of your current information will always be kept in the new wallet file.

When the import is finished, we recommend that you use eWallet to open your new wallet file. This will let you check each card to be sure that the info appears as you want it.

For any card, you'll have the option to:

- **Import the Card** You can either use the Import Wizard's selected card type, or choose a different card type from the list. The Import Wizard tries to choose the best card match based on the info being imported. Either way, the Import Wizard will match your existing info with the fields in the eWallet card. If the Import Wizard can't find a good match for any specific fields, it will put the information for that field into the "Notes" area of the card. All of your current information will always be kept in the new wallet file.
- **Auto Import Remaining Cards** This will skip prompting you for the rest of the card types, and import the remaining cards using the Import Wizard's best assessment of the appropriate eWallet card type. The same rules above will be followed.
- **Skip Card** This will mark the current card as not to be imported.
- **Skip Remaining Cards** This will mark the rest of the cards in your import file as not to be imported, and will take the Import Wizard to the next step (actually importing the cards).
- **Cancel Import Wizard** This will cancel the card Import Wizard. Your new wallet file will not be created.

When this stage is done, the Import Wizard will import your information to the new wallet file you've specified. When the import is finished, we recommend that you use eWallet to open your new wallet file. This will let you check each card to be sure that the info appears as you want it.

### 2.6.1. Importing from CSV

You can convert your data from another data management system to use in eWallet.

eWallet does not support a completely generic import, but you should be able to format your text data so eWallet can to import it.

The easiest way to do this is in a spreadsheet program like Microsoft Excel, although you can use any text editor or other program that can make a .csv (comma separated values) file as well. The rest of the information here assumes you're using Excel.

Format your .csv file as follows:

- The file **must** use a comma as the separation character, and not any other character such as a tab
- Any actual commas in the data must be surrounded in double quotes ("")
- Each card is one row
- Each card has **9** columns
- Each column **A** is the **Card Type** (*This column is required*)

This must be one of the 18 Card Types shown below.

- Each column **B** is the **Card Name** (*This column is required*)
- Columns **C** through **G** have information specific to each card type (see below)
- Column **H** is the **Card Note**
- Column **I** is the **Category** (*This column is required*)

For each row (card), the Card Type, Card Name and Category are **required**. Information in all other fields is optional.

In addition, there needs to be **one identifier row** at the beginning of the file. This can have any information you want (it won't be imported), but does need to have some information (just in the first column).

For the card types supported, columns **C** through **G** should have the following information:

| Card Type      | Column C    | Column D   | Column E  | Column F   | Column G |
|----------------|-------------|------------|-----------|------------|----------|
| Bank Accts     | Account #   | PIN        | Name      | Branch     | Phone #  |
| Birthdays      | Date        |            |           |            |          |
| Calling Cards  | Access #    | PIN        |           |            |          |
| Clothes Size   | Shirt size  | Pants Size | Shoe Size | Dress Size |          |
| Combinations   | Combination |            |           |            |          |
| Credit Cards   | Card #      | Exp. Date  | Name      | PIN        | Bank     |
| Email Accts    | Username    | Password   | POP3 Info | SMTP Info  |          |
| Emergency Info | Phone #     |            |           |            |          |
| Frequent Flyer | Number      | Name       | Date      |            |          |

| Card Type      | Column C     | Column D | Column E | Column F | Column G |
|----------------|--------------|----------|----------|----------|----------|
| Identification | Number       | Name     | Date     |          |          |
| Insurance      | Policy #     | Group #  | Insured  | Date     | Phone #  |
| Memberships    | Acct #       | Name     | Date     |          |          |
| Phone Numbers  | Phone Number |          |          |          |          |
| Prescriptions  | Rx #         | Name     | Doctor   | Pharmacy | Phone #  |
| Serial Numbers | Serial #     | Date     | From     |          |          |
| Vehicle Info   | License #    | VIN #    |          |          |          |
| Voice Mail     | Access #     | PIN      |          |          |          |
| Web Logins     | Username     | Password | URL      |          |          |

The **card types** in your file must be **exactly** as shown above.

The table below is an example, showing 6 cards in 2 categories.

|   | A                | B              | C                   | D             | E            | F           | G   | H            | I          |
|---|------------------|----------------|---------------------|---------------|--------------|-------------|-----|--------------|------------|
| 1 | My Personal Info |                |                     |               |              |             |     |              |            |
| 2 | Credit Cards     | Earthbank Visa | 5543 2443 5243 3636 | 09/15         | James Kirk   | 89898       | PNC | 1% cashback  | personal   |
| 3 | Email Accts      | Earthnet Email | jamestkirk99        | slithytoves   | pop3.ean.us  | mail.ean.us |     |              | personal   |
| 4 | Memberships      | Jet Blue Air   | 7766766767677       | James T. Kirk | 07/2112      |             |     | aisle seats! | personal   |
| 5 | Web Logins       | eBay           | jkt06438            | buystuff7     | www.ebay.com |             |     | also PayPal  | personal   |
| 6 | Voice Mail       | Work VM        | 88 909 9009         | 898245        |              |             |     | use # not *  | work cards |
| 7 | Credit Cards     | Work Amex      | 3456 123456 54321   | 12/2015       | James Kirk   | 636363      |     |              | work cards |

Then, run the eWallet Card Importer on your .csv file. Select CSV as the file format to import.

Don't forget to open your new wallet file using eWallet; this will let you check your information. Plus, you'll be able to add more useful information to your existing cards, as well as more cards and card types to your wallet.

## 2.7. Protecting Your Information

Anytime you open a password protected wallet, eWallet will ask you for the password. Until the correct password is provided, eWallet will not display any of the wallet's contents.

Once opened, your wallet *remains unlocked* until:

- you close eWallet on your Windows PC
- you lock the wallet file by selecting the **Lock** button on your Windows PC
- eWallet automatically locks your wallet file if you've chosen to have it do so (See below for information about how to do this)



### Important

We recommend always locking your wallet file when you're not actively using it.

You can also choose to create a **wallet without a password**. This is useful for storing non-confidential information that you want easy access to. For instance, contacts, family pictures, clothing sizes, and emergency phone numbers are all information you might want to put into a wallet that does not require a password.

You can change the password for any wallet, or add a new password to an unprotected wallet by clicking the **Change Password** button from the **Sync Manager** on the **Home** ribbon. When changing the password for a password protected wallet, eWallet will ask for the original password first.

You can also set eWallet to lock automatically from the Security Options for the wallet by clicking the **Security Manager** button on the **Home** ribbon on a Windows PC. From there, you can select timeout locking and other security features. Read more about these options in Chapter 4, *eWallet Security* (page 25).

## 2.8. Selecting a Wallet Password

Choose a password for your wallet that's easy for you to remember but would be hard for anyone else to guess. It is best (most secure) to choose a password that is at least twelve characters long and contains at least one non-alphanumeric character. One convenient way to do this is to choose two unrelated words and separate them with a dash, asterisk or other non-alphanumeric. For example, "clock-kitten" would be a reasonable password.

Optionally, you can set a password hint for your wallet when you set or change your password. Choose something that will remind you of your password, but will not give your password away to someone other than yourself.

Please note that if you forget the password for a password protected wallet, you will **not** be able to access any of the information in that wallet. *Choose your passwords carefully*. Also, if you do run into trouble, remember that passwords are case-sensitive — if your password is not being accepted, check that your Caps-Lock is not on.

## 2.9. Getting Started Summary

At this point, you should know:

- the difference between *cards* and *categories* in eWallet
- how to *create and change* eWallet cards
- how to *protect the information* in your eWallet files

The rest of this document contains more detail about eWallet's features, functions and options available. You can read through them, just use them for reference, or just read the sections you're interested in.

You're now ready to begin using eWallet with your own information. You can either decide how you want to organize your information and create categories first, or just start creating cards and move them into specific categories using cut and paste later.



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## Chapter 3. Using eWallet

While using eWallet, keep in mind that some options may be unavailable or work differently depending on what kind of object (card, category, etc.) you have selected or are viewing.

Right click on objects to bring up a context menu for that object, or hover over an object to bring up a tool tip describing that item.

### 3.1. eWallet Files

**Files** are the topmost level of information used by eWallet. In eWallet, we call files **wallets**. Just like any other file on a Windows PC, wallets are completely separate from one another. You can have as many wallets as you want, each with different kinds of information. For example, you might have one wallet for work and one for personal information. Each wallet has its own password.

If you ever lose track of your wallet files, doing a Search on your Windows PC for:

\*.wlt

will typically find every wallet on your computer.

**Opening Wallets** is handled differently on different devices. When you run eWallet, however, it will automatically attempt to open the last wallet you used. You may never need to open your wallets any other way.

Double clicking on a wallet file will open a wallet in eWallet. You can also open wallets by clicking on the **File/Start** button in the upper left corner of eWallet and then selecting **Open...** from the menu.

You can **make changes to your wallet files** using copy, delete, rename, or move files using File Explorer in the same way that you make changes to other file types on your computer.

You can **Create New Wallets** to store your information if you like. Click the **File/Start** button in the upper left corner of eWallet, and select **New** from the menu.

Password protected wallets have one password. eWallet will prompt you to select this password when you first create a new wallet. The password is required to view the contents, or change the password, of a password protected wallet.

On your Windows PC you can copy or move cards **between eWallet wallets** using your system clipboard (Copy/Paste or Cut/Paste).

If you'd like to share a wallet in a workgroup environment and have multiple users access it from their Windows PC desktop computers, you can place your wallets in a directory on your network. The first person that opens the wallet can write to the file, everyone else will

have read-only access. Alternatively, you can have individual users synchronize from the central wallet to a local wallet on their computer.

See Also:

Chapter 4, *eWallet Security* (page 25)

Chapter 6, *Synchronization* (page 31)

## 3.2. eWallet Categories

In eWallet, you use **Categories** to organize your information. Every wallet must have at least one category, and you can have many different categories in a wallet.

Use categories to organize your cards in a way that makes sense to you. You can place any kind of card in any category, and as many or as few cards as you want in a category.

Each category has the following properties:

- **Name:** the name of the category
- **Icon:** the icon representing the category
- **Default Card Type:** this lets you select the initial card type selected when you create a new card in that category. You can always choose a different type when you create the card, and you can have many different types of cards in a single category. This pick just controls the initial setting for new cards. You can pick any of eWallet's available card types.

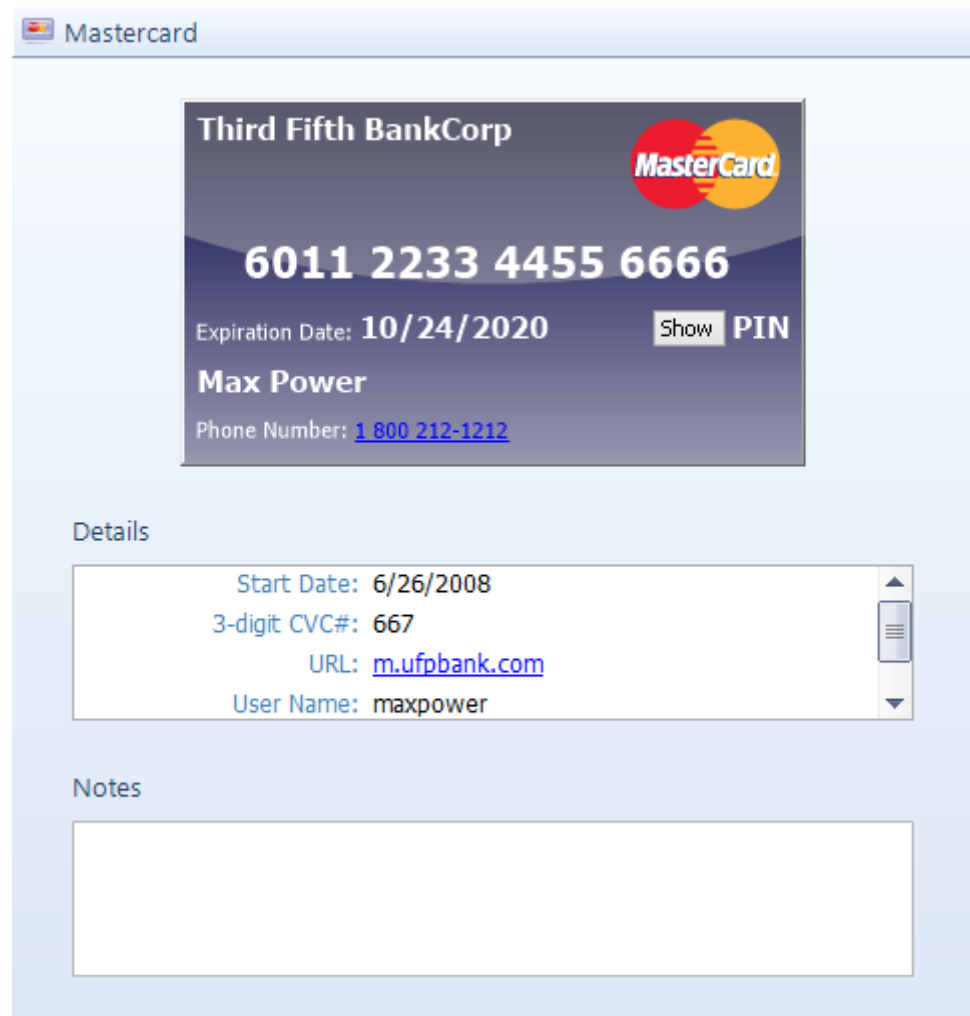
You can edit the properties for a category at any time. You can also nest your categories to further organize your information.

See Also:

Chapter 4, *eWallet Security* (page 25)

## 3.3. eWallet Cards

eWallet stores your information in cards. Think of cards just like the cards in a real wallet. Each card will contain several pieces of related information. For example, a password card might have a username, a password and a URL. You can also personalize cards. Each card must be placed in a category, but categories can contain many different types of cards. Organize your cards in whatever way makes the most sense to you.



eWallet Card View

You can **move your cards between categories** at any time. You can move cards between categories using drag and drop. You can also use your system clipboard (cut / copy / paste) to move cards around. Edit, delete, rename, cut, or copy cards by selecting the card and then right-clicking on the card to show the context menu.

### 3.3.1. Card Types

eWallet provides 31 different card types (also called **templates**) for you to choose from when making a new card (listed below).

Each card has fields and labels appropriate for the kind of information generally kept on that card type. For example, a credit card provides fields for:

- the card provider

- the card type, number and expiration date
- the name on the card
- your Personal Information Number (PIN)
- the customer service telephone number

But you can always enter any kind of information in any field on any card and even rename fields to suit your needs.

You'll notice the Fields area is broken up into two sections: the **Card Face Fields** section and the **Details Pane Fields** section. The Card Face Fields typically contain the items you would see on the physical card itself (card number, expiration date, etc.) while the Details Pane Fields can be used for the additional information that goes with the card such as a URL, username and password. You can enter any additional information you might want in the **Notes** area of any card.

Each card type has a default **icon** associated with it, but you can **change the icon** to anything you like. In the Card List click on the card whose icon you want to change, then select the **Design** ribbon.

The following card types are provided in eWallet:

- **Bank Account** - Account numbers for your financial accounts
- **Calling Card** - Telephone calling cards, with access numbers and PINs
- **Car Info** - Information found on your vehicle registration, plus insurance
- **Cellular Phone** – Store your critical mobile phone information
- **Clothes Sizes** - For you, and for the people you buy clothes for
- **Combination Lock** – The combination for any locks or lockers you may have
- **Contact** - Names and phone numbers for personal contacts
- **Contact Lens Prescription** - Prescription information for contact lenses, in case you need to replace them when away from home
- **Credit Card** - Credit card numbers and info, including PINs
- **Driver's License** – You can also use this card for medical and other licenses
- **Email Account** – System URLs, names and passwords for your email accounts
- **Emergency Numbers** – Fire, ambulance, police and other emergency telephone numbers

- **General Purpose** – 6 card fields and 25 details fields you can customize
- **Health Numbers** – Insurance, Hospital, prescription, group numbers, etc.
- **ID Card** – National ID Card or other general purpose ID Card
- **Insurance Policy** - Auto, Life, Home and other policies, with the number to call for claims
- **Internet Settings** – System URLs, names and passwords for your ISP accounts
- **Lens Prescription** – Prescription information for eyeglasses in case you need to replace them when away from home
- **Library Card** – Number and PIN
- **Membership Info** - Frequent flier (airline) numbers, video rentals, store discount, non-profits, and more
- **Note Card** – A card for any unformatted information
- **Passport Info** – Everything on your passport, very important to have a copy
- **Password** – Usernames and passwords you may have on all the computer systems you use
- **Picture Card** – On the platforms that support picture cards, select any picture that fits on your screen, in bmp, jpg, or png format
- **Prescription** – Dosage and other information for prescription drugs
- **Serial Number** – Your purchases, including serial numbers, model numbers and purchase date and location information
- **Social Security Number** – Use this for other identification numbers too
- **Software Serial Number** – Registration codes, purchase dates and other software product information
- **Voice Mail Info** – All the access numbers, passwords and commands you need
- **Voter Card** – Do you remember where to vote from election to election?
- **Web Site** – URL and user or password information for any web sites you log into

### 3.3.2. Field Options


eWallet gives you the option to change the label or type for any field in a card. For instance, you might find that a particular card does not have as many hidden fields as you might like, or perhaps you don't need a URL on the card but you do want an additional phone number field. By editing the options for a field, you can create exactly the sort of card you need.

In the Card List click on the card you want to edit, then select the **Edit Fields** ribbon. Next, select the field you want to change, then customize the field using the options in the Field Options group of the **Edit Fields** ribbon.

When setting a type for a field, you can choose from the following field types.

- **Date** - A field formatted for dates. This field allows you to enter the date manually or using a pop-up calendar.
- **eMail** - A live email link. When clicking on the contents of this field, eWallet will trigger your default email software and prepare an outgoing email using this address.
- **Hidden** - A hidden field. Adds a button to the card used to show or hide the contents of this field.
- **Numeric** - A field formatted to only accept numbers.
- **Phone Number** - A live phone number link. On devices that include a phone, tapping this live link will automatically dial the number listed as the content of this field. On a Windows PC, if Skype is installed, selecting this link will make a call using Skype, as long as the number is formatted internationally, e.g., +17345551212.
- **Text** - A plain text field. Enter whatever text you like.
- **Web Link** - A live link to a web site. Tapping on this link will automatically open a website on your default browser using the content of this field as the URL.
- **AutoPass Password** - Tells eWallet to use the contents of this field for the password when using AutoPass on your Windows PC.
- **AutoPass Username** - Tells eWallet to use the contents of this field for the username when using AutoPass on your Windows PC.
- **AutoPass Web Link** - Tells eWallet to open the website listed in this field and use the fields on this card defined as AutoPass Username and AutoPass Password to fill in the login fields for that site.

### 3.3.3. Extra Fields

Need to store additional information that's not covered by the existing named fields? You can add extra *details* fields, and set them to the type you want, by pressing the  button on the **Edit Cards** screen.

### 3.3.4. Custom Templates

If none of the card types we provide is exactly what you are looking for, the options for editing field names and types will allow you to create the exact sort of card you need.

On Windows PC you can also customize the basic card types to create custom sets of templates.

To rename the label for a field, select the Edit Fields ribbon and then click on the field label you wish to change. Enter a new name in the Field Name field of the Field Options group of the **Edit Fields** ribbon.

If you have a particular set of changes you'd like to use all the time, you can save a customized card as a template. Once you've done this, whenever you go to make a new card, your template will appear as one of the card types you can choose from. You can do this by right-clicking on the card in the card list selecting **Save to Template**.

If you want to view all of the templates on your Windows PC, use **Edit Templates** to access the templates file. You can edit templates the same way that you edit a normal eWallet card. Any changes made to a template will automatically appear in any new cards made with that template, but changing a template will not alter existing cards. Click on the **Edit Templates** on the **Edit** ribbon.

Note that embedded images are not supported in templates.

### 3.3.5. Card Properties

In addition to the fields (containing data) in your eWallet cards, you can also control card colors, borders, card icon, and other aspects of the card's appearance. If appropriate for the card type and platform, you can also set whether a card is scrollable, whether a hidden field (for example, a PIN) is initially displayed, and whether the icon displays on the card face itself. Some appearance options are not available on some platforms.

To change the appearance settings for your cards, go to the Card List and click on the card whose appearance you want to change, and then select the **Design** ribbon.

The **appearance** settings allow you to set the card's background color, color gradients, text color, icon and related settings. Most of these features are available on most devices.

There are a number of settings you can choose from. If the card has hidden fields, such as a password, PIN or lock combination, you can choose whether the field should be hidden when the card is first displayed (**Hide**), showing (**Show**), or displayed in the same state it was when you last displayed the card (**Remember**). You can also select the color for the text and card background, as well as the icon associated with the card.

You can also choose between **Square** and **Round** corners for the card when it is displayed using Card View. Choose to **Show the Icon on the Card** to display the card's icon on the card itself in Card View. Select **Border** to draw a border around the card in the card pane. Choose **Flex View** to present the card in a grid style format, rather than the traditional card style format.

The option to add a **Background Picture** to your cards is available for most types of cards on most platforms. You can use either regular Bitmap files, with the .bmp extension, the .png extension, or JPEG files, with the .jpg extension. You can choose to **Insert** the picture to copy the file into your wallet. Inserted images will sync to some, but not all devices. You can also choose to **Link** to a picture to use a bitmap or JPEG file that remains outside the wallet file (on Windows PC, the picture must be in the eWallet\Graphics and Sounds folder in your My Documents folder for eWallet to link to it.) These images will not synchronize to other device. If you choose to **Remove** a picture, the picture is removed from the card.

Some devices offer a **Picture Position** button that allows you to choose how the graphic is positioned on the card. You can choose to **Center** the picture or to display it in the **Upper Left**, **Upper Right**, **Lower Left** or **Lower Right** corner of the card. You can also choose to **Tile** the picture over the entire area of the card. If the card is a Credit Card, on some devices you can also choose to use the graphic to replace the default credit card logo (**Replace Default Logo**). See Section 3.3.7, “Background Graphics” (page 20) for complete information.

### 3.3.6. File Attachments

On Windows PC, eWallet allows you to attach files to your cards so that you can keep important images and documents close at hand. Files you **attach** to a card will be encrypted and synchronized. You can attach any type of file to your wallet including documents, pictures, sound files, and more.

To attach a file to a card, click the **Attach** button on the **Design** ribbon.

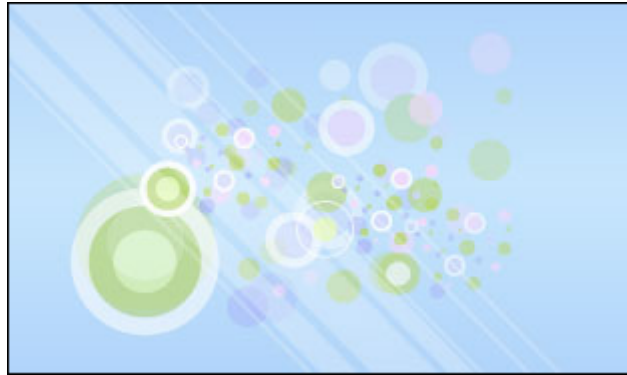
To extract an attached file, click the Attachment graphic in the top right corner of the card display.

### 3.3.7. Background Graphics

On some platforms, you can customize the appearance of your eWallet cards by adding **pictures** to the background. eWallet supports both bitmap and jpeg image types, and on



iPhone and iPod touch it supports images taken with the camera as well as images stored in the gallery and photo library on the device.



You have two ways to add pictures: **link** or **insert**.

**Linking** a picture does *not* add the picture to your eWallet wallet. Instead, a shortcut to that file is added to the card which allows the picture to display in the background when you view that card. When synchronizing your eWallet information, the shortcuts to linked pictures are synchronized by SyncPro but the images are not. As long as you've placed the same image in the appropriate folder (see below) on both your Windows PC and your Windows Mobile device, the linked picture will appear on the card on both devices.

To link to a picture on Windows PC or Windows Mobile, you must store the graphic in:

`My Documents\eWallet\Graphics and Sounds`

Linking pictures to wallet files on Windows PC, rather than inserting them, also allows you to use different graphics for your cards on each platform. For example, you might create a smaller version of a graphic for use on a Windows Mobile (touch) device. The link files option makes this simple – just create different graphics, with the same filename, and put them on the appropriate device. You also have the option to leave a linked graphic off of your device completely, perhaps as a means of saving memory: if a linked picture file is not present on any platform, the card will display normally but eWallet will simply not show the picture. This feature is not supported on all platforms.

**Inserting** a picture, copies the entire picture into your wallet and it will automatically synchronize the image to eWallet on any other devices that support background images. If the wallet is moved, copied, synchronized, or backed up, all inserted pictures will be moved, copied, synchronized, and backed up as well.

Another advantage of inserting pictures is that the pictures are encrypted along with the rest of the information in your wallets.

On your **Windows PC and Windows Mobile** devices, you can use picture files in bitmap (.bmp) or jpeg (.jpg) format in eWallet (also .png format on Windows PC). Pictures can be any size, but you probably want to size them appropriately for the display.

The following table shows sizes (in pixels) for card displays:

| Device                                       | Card Size | Credit Card Logo Size |
|--|-----------|-----------------------|
| Windows PC                                   | 312 x 184 | 95 x 55               |
| Mac  | 312 x 184 | 95 x 55               |
| Windows Mobile Professional                  | 237 x 181 | 78 x 50               |
| Windows Mobile Professional (High Res)       | 474 x 362 | 156 x 100             |
| Windows Mobile Standard (Portrait)           | 170 x 180 | 54 x 34               |
| Windows Mobile Standard (High-Res Portrait)  | 240 x 320 | 76 x 48               |
| Windows Mobile Standard (High-Res Landscape) | 240 x 263 | 76 x 48               |
| iPhone or iPod touch                         | 292 x 182 | n/a                   |

The listed card sizes will create an appropriately sized background image.

The listed Credit Card Logo sizes will make a credit card logo of a size similar to the ones we automatically display for many credit card types in the Credit Card template.

Please note that only inserted pictures are encrypted and synchronized. Linked pictures are never encrypted or synchronized.

You can get pictures from any source, as long as they're in the previously mentioned formats. Many websites have pictures available for free download. Ilium Software also offers free Windows PC card backgrounds and icon packs for download on our website.

### 3.3.8. Icons

On Windows PC you can add custom icons for cards and categories using standard Icon (.ico) files. Many websites offer free icons for download, and Ilium Software offers a number of free Icon Packs that you can download from our website. You can also use icons you create yourself with any Windows PC icon editor.

To display properly, Icon files must contain all of the proper image sizes. Most professionally made icons already contain the necessary icon sizes. Icon sizes should include 16x16 and 32x32 graphics.

For eWallet to find the icons, you must store them in:


My Documents\eWallet\Graphics and Sounds

## 3.4. AutoPass

eWallet for Windows PC has a feature called **AutoPass** for cards that have URLs, usernames and passwords. With AutoPass enabled, eWallet will attempt to fill-in the username and

password fields for you when you launch the web page from the eWallet card. Currently this feature is available for Internet Explorer, Chrome and FireFox. If you are using a different default browser such as Opera, we suggest disabling AutoPass. To disable AutoPass, click the **Options** button in the **start** menu, and check the Disable AutoPass box in the Application options.

## 3.5. Shortcuts

Shortcuts allow you to have your card information in more than one category without having to duplicate the information. To create a shortcut to a card, right-click on the card in the card list and select **Create Shortcut**. Shortcuts have a special icon  in the card list to help identify them. You can delete shortcuts the same way you would delete a card. Deleting a shortcut will not delete the card it points to but deleting a card will automatically delete any of its shortcuts.

## 3.6. Exiting eWallet

On Windows PC you can close the eWallet program in the same fashion that you close many other applications on your PC: by pressing **File/Start** then **Exit** or by clicking the red X at the top right of eWallet's window.

## 3.7. Global Options

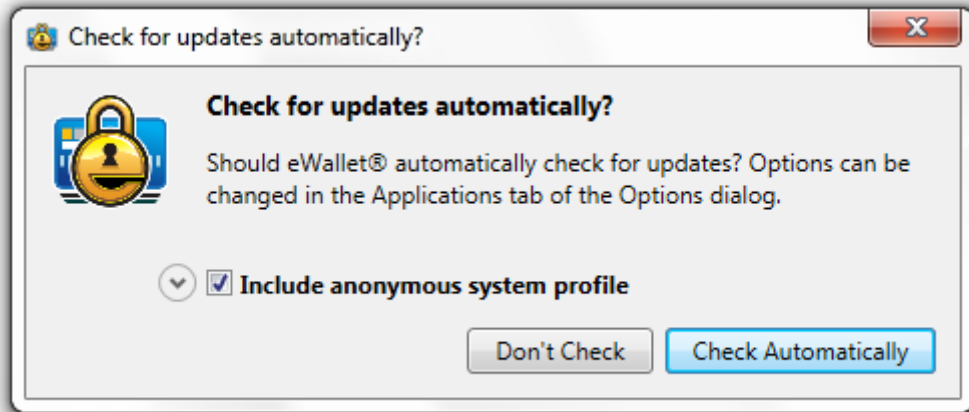
You can get to global options from **File/Start** then **Options**. These options affect all of your wallets on Windows PC. The options include Application options like disabling tooltips, Card options for setting card defaults, Security options like time before your wallet auto-locks, Synchronization options like whether Sync should be confirmed or not, and Auto Update options.

## 3.8. Appearance

The appearance of the Tabs and Ribbons can be changed from the **Window** dropdown in the menu area. You can change the overall ribbon style, the window color scheme, as well as the background color around the Card view.

## 3.9. Updates

eWallet has a built-in feature (Internet connection required) where it can automatically check for updates to the application. Periodically when you start eWallet, it will check and see if a newer version is available. If a newer version *is* available, you will be able to download it directly or skip it. You can also check for new versions by pressing the **Check for Updates** button in the **About eWallet** screen.



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## Chapter 4. eWallet Security

eWallet protects your wallet information in 2 ways:

- by requiring a **password** before displaying any cards in a password protected wallet
- by **encrypting** (making unintelligible) the information in cards in password protected wallets in your wallet file. This means that the information in the file is translated into a secret code so that it can't be read by any other program.

You can set eWallet files to either require a password or not require a password. Read *Protecting Your Information* (page 10) for more information about how passwords work.

For quick access, you can create a wallet that does not require a password, but information in that wallet is accessible to anyone who opens the wallet.

*We recommend using wallets without passwords only for general, non-confidential information.*

eWallet uses the Advanced Encryption Standard (AES) encryption algorithm, with a 256-bit key to encrypt the data in your cards in password-protected wallets. AES is considered one of the very best encryption algorithms.

**FIPS Certification.** Ilium Software eWallet 8.1 is FIPS compliant on the Microsoft Windows 7 platforms where it uses Microsoft cryptographic libraries that have received certificates and have been validated as conforming to the Advanced Encryption Standard (AES) Algorithm, as specified in [Federal Information Processing Standard Publication 197, Advanced Encryption Standard]. Please see the [Advanced Encryption Standard Algorithm Validation List](http://csrc.nist.gov/groups/STM/cavp/documents/aes/aesval.html)<sup>1</sup> for more information.

You can explicitly *lock your wallet* at any time, by choosing the **Lock Wallet** button on the **Home** ribbon of your Windows PC.

A password is required to open any password protected wallet. eWallet will prompt you for a password when you first open a password protected wallet. After entering the correct password, you may use all of the wallet's features until it is locked again.

You can **increase the security** of eWallet using the available security options. Click the **Security Manager** button on the **Home** ribbon.

The security options include:

- Having eWallet close and lock your wallet after a specified amount of time if it doesn't get any user input. Whether the wallet is active or minimized, the wallet will automatically lock. Once the wallet is closed and locked, the password is required to access the wallet

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<sup>1</sup> <http://csrc.nist.gov/groups/STM/cavp/documents/aes/aesval.html>

again. Choosing this option will help prevent someone from being able to see your information if you've unintentionally left your wallet open.

- Having eWallet lock out wallet access if a specified number of incorrect password attempts are made. Once the wallet's access is locked, no attempts to open the wallet are allowed for a specified period of time. You can choose how many incorrect password attempts will be allowed before the wallet's access is locked, and how long the wallet's access stays locked once the limit has been reached. This will make it more difficult for someone to try to break into your wallet by guessing several passwords or using a piece of software that automatically enters passwords. However, this will also make it more difficult for you to try multiple passwords if you misplace or forget yours, so use this option with care.
- On Windows PC you can turn off password protection for a wallet from the **Security Manager**. When this box is checked, the wallet will open without requiring a password. This is not a secure way to store your data and you should only use it for information that is not sensitive.

Choose a wallet password that's easy for you to remember, but would be hard for anyone else to guess. It is best to choose a password that is at least twelve characters long and contains at least one non-alphanumeric character. One convenient way to do this is to choose two unrelated words and separate them with a dash, asterisk or other non-alphanumeric. For example, "clock-kitten" would be a reasonable password. Please note that if you forget a password, you will not be able to access the information in your wallet file. Choose your passwords carefully. Remember that passwords are case-sensitive — if your password is not being accepted, check that your Caps-Lock is not on.

See Also:

Protecting Your Information (page 10)

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## Chapter 5. PassBuilder

PassBuilder™ allows you to generate a password within eWallet.

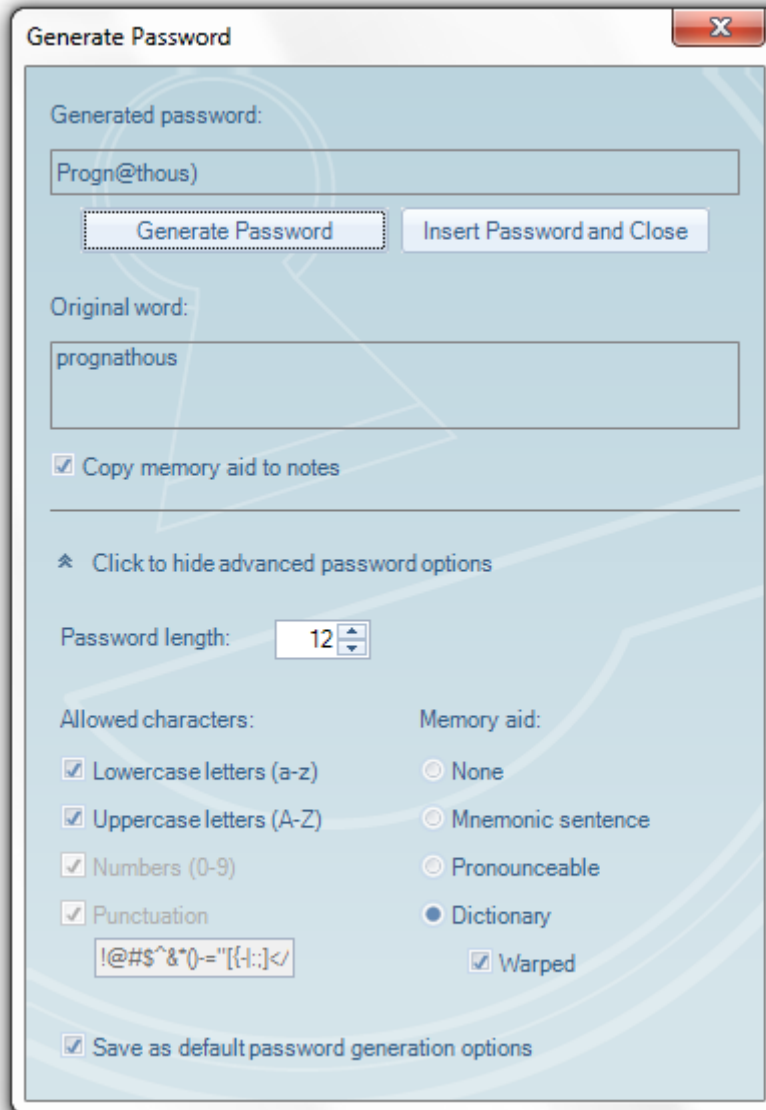
### 5.1. Using PassBuilder

1. Edit a card and select the field where you would like to store the password and click **Generate Password** in the **Edit Fields** ribbon on your Windows PC.
2. You will be presented with the PassBuilder window which will allow you to choose several options.
3. Pressing **Generate Password** will build a password to your specification.
4. You can then press **Insert Password and Close** to copy your new password into your wallet card, replacing any previous value in the field.

#### 5.1.1. Instant Passwords

Clicking the **Instant Password** button  next to a hidden field will instantly create and insert a password for you without you having to go to the separate **Generate Password** screen. The passwords are built using your specifications from the **Generate Password** screen when **Save as default password generation options** was checked.

## 5.2. PassBuilder Options



### 5.2.1. Password Length

The length of the generated password can be up to 30 characters.

### 5.2.2. Allowed Characters

- **Lowercase Letters (a-z)** — The password can include lowercase English characters.
- **Uppercase Letters (A-Z)** — The password can include uppercase English characters.
- **Numbers (0-9)** — The password can include numbers (digits). In addition, selecting this option will ensure that at least one character in the generated password is a number.



- **Punctuation** — The password can include any of the punctuation characters included in this field. PassBuilder defaults to including:

! @ # \$ ^ & \* ( ) - =

but you can change the field to anything you like.

### 5.2.3. Memory Aid

- **None** — This option will generate the most secure password but at the expense of being harder to remember.
- **Mnemonic Sentence** — With this option, PassBuilder will also generate a sentence that could help you to remember the password. For example, if PassBuilder generates the password *Bni*, it would show you the mnemonic sentence was *Brian nibbled icons*. Any **Numbers** or **Punctuation** will be added to the end of the sentence.

When selecting this option, you will also be presented with two additional buttons: the **Copy Memory Aid to Clipboard** button will copy the mnemonic sentence to the clipboard for your use in other software and the **Append Memory Aid to Card Note** button will add the mnemonic sentence to the end of your card notes.

- **Pronounceable** — The Pronounceable option is based on the U.S. governments FIPS 181 specification for creating pronounceable passwords. The key advantage is that a Pronunciation Aid will be displayed that uses syllables to help you remember your password. Any **Numbers** or **Punctuation** will be prepended and/or appended to the password.
- **Dictionary** — The Dictionary option starts with a word from a built-in dictionary. Additional characters are then mixed into the password to fill it out to the requested **Length**. If the **Warped** option is checked, certain characters will be changed so the password is still readable, but it would be harder for someone to guess. For example, an **a** might be changed to an **@** and a **s** might be changed to a **5** or a **z**.

### 5.2.4. Notes

If you've selected the Notes field as the destination for your password, the password you generate will be appended to the end of the Notes field.

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## Chapter 6. Synchronization

Synchronization is the process of keeping wallets that are stored in multiple locations updated with the same information. This way, if you make a change to a wallet on your mobile device, the next time you view the same wallet on another mobile device or your desktop/laptop computer, your change will be there.

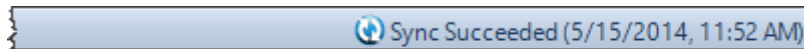
With SyncPro Synchronization, you can make simultaneous changes to different cards on your Windows PC, a remote location, a USB drive, or mobile device and all the changes will be synchronized. SyncPro goes through all the cards and matches the changes between the locations. Even if you've made changes in three different locations (on your Windows PC, iPhone, and an Android device for instance) SyncPro will go through and combine all the changes you've made.

eWallet 8.1 for Windows PC synchronizes your information with a built-in sync engine called SyncPro<sup>®</sup> and offers three different kinds of sync: Cloud sync, Device Sync, and FTP/folder sync. SyncPro's cloud sync on Windows PC allows backing up to a cloud service (currently Dropbox) as well as using the cloud service to sync with eWallet on other devices (currently iPhone, iPad and iPod touch). Device Sync offers an alternative syncing method that is more direct and doesn't require a cloud service; in most cases sync occurs directly between two devices using a local WiFi network or in some cases a cable. SyncPro also offers synchronization to a FTP server or a folder, which can be very handy in an office environment.

eWallet's **Sync Manager** will help configure the kind of sync you want for your wallet. Once it's configured, you just press the **Sync Now** button to synchronize your wallet. Some of the sync types can also happen automatically when eWallet opens and closes.



The Status Bar at the bottom of the Windows PC version of eWallet indicates the last status of the most recent synchronization, regardless of which wallet is currently open.



SyncPro synchronization is setup, run, and managed in the Windows PC version of eWallet. Use the **Sync Manager** to change synchronization settings for your open wallet file. To change settings for another wallet file, first open the file, and then select **Sync Manager**. To start with a cloud wallet, make sure no wallets are open in eWallet and then start the **Sync Manager**.

## 6.1. SyncPro Synchronization

With SyncPro synchronization, you can make simultaneous changes to different cards on your Windows PC, an Android OS device, BlackBerry, iPad, iPhone, iPod touch, Windows Mobile device, other computers/disks on a network, remote storage locations, or any other storage device attached to your computer and all changes will be synchronized.

If you are syncing with an iPad, iPhone, iPod touch or Android device, you may want to install an application from Apple called Bonjour. Most likely, however, if you are using iTunes you already have this installed. If you need to download and install Bonjour, eWallet will tell you as well as provide instructions about how to do this.

### 6.1.1. Synchronization Setup

To setup synchronization for an Android device, BlackBerry, iPad, iPhone, iPod touch, Windows Mobile device, remote location, different computer, or external storage device, open the Sync Manager window by clicking the **Sync Manager** button on the **Home** ribbon on the Windows PC version of eWallet. You will see the following areas and buttons in the Synchronization Setup display.

- **Sync Location:** These are devices that are ready to synchronize with eWallet. They may or may not be set to synchronize with the particular wallet you have open. If eWallet does not automatically display the device you would like to synchronize with, you can click the **Add** to add a new "location" (device/service/folder, etc.) to this list. For the Windows Mobile devices synchronizing using the Windows Mobile Device Center, the name shown is the personal name you gave the device when you set up the partnership between Windows Mobile Device Center and your device. For Android, iPad, iPhone and iPod touch the name displayed is the device name.
- **Add:** This button allows you to add additional locations (devices, services, etc.) that you would like to synchronize wallets to. For more information on this, see Section 6.2, "Adding Sync Locations" (page 34).
- **Edit:** This button allows you to edit the details for a Sync Location on the list or **change the Sync direction** (the direction eWallet sends data when you sync).
- **Remove:** This button removes a Sync Location from the list. If you remove a location, you can always add it to the list again using the **Add** button.

| Synchronization Directions             | When to use   |
|--|---|
| Wallet Synchronizes with Sync Location | You often change data both on the Windows PC and in the wallet stored at the Sync Location.   |
| Wallet overwrites Sync Location        | You only make changes on the Windows PC and never make changes directly to the wallet stored at the Sync Location. This is useful if you wish to save a backup to a different folder on your PC or a remote sync location.  |
| Sync Location overwrites Wallet        | You only make changes to the wallet stored at the Sync Location and never make changes to the wallet on your Windows PC. You might choose this to synchronize a company wallet on a server to the Windows PC you are using. |
| None                                   | No synchronization will occur.  |

To run synchronization click on the **Sync Now** button in the toolbar.

Remember that your eWallet passwords need to be the same on any wallets (cloud or otherwise) that sync with each other.

### 6.1.2. Change the Sync Direction

There are times when you may want to change the direction eWallet is synchronizing. That is to say, you may want to only transfer the information in one direction or the other, rather than truly synchronizing the wallets. To change the direction your information is synching, follow the steps below.

1. Open eWallet on your Windows PC and click the **Setup** button in the Synchronize group on the **Home** ribbon.
2. Right click on your device in the list of Sync Locations.
3. Select the way you would like your information to synchronize from the context menu that comes up.

You can also change the sync direction by clicking on the device in the Sync Location list, and then clicking the **Edit** button.

## 6.2. Adding Sync Locations

You can setup eWallet to synchronize with additional devices, services and locations using the **Add** button. eWallet can synchronize with Android devices, Windows Mobile devices, iPhones, iPod touch, BlackBerry devices, USB drives, computers/disks on a network, FTP sites, and most any other type of remote storage device you might use. You can even set eWallet to synchronize a wallet to a different folder on the same computer as a means of making a regular backup of your data.

To add a new Sync Location do the following:

1. Select the **Sync Manager** button from the **Home** ribbon on the Windows PC version of eWallet.
2. Click the **Add** button.
3. Click the button for the type of location you would like to add.
4. Follow the instructions on the screen for adding a location of that type. Note that for some locations, such as Android, iPhone and iPod touch, you may need to perform additional steps on the device to add it as a new location. The instructions eWallet provides will let you know if this is necessary.

At the end of the setup process, eWallet may ask if you would like to synchronize. You can synchronize immediately or click **No** and synchronize later. Whenever you synchronize your wallets in the future, the wallet will be synchronized to the new location as well.

If you've made a mistake when entering the path or address for another computer or a remote location, you can correct it by selecting the Sync Location and then clicking the **Edit** button.

To synchronize with a remote location or another computer, you must use the proper formatting.

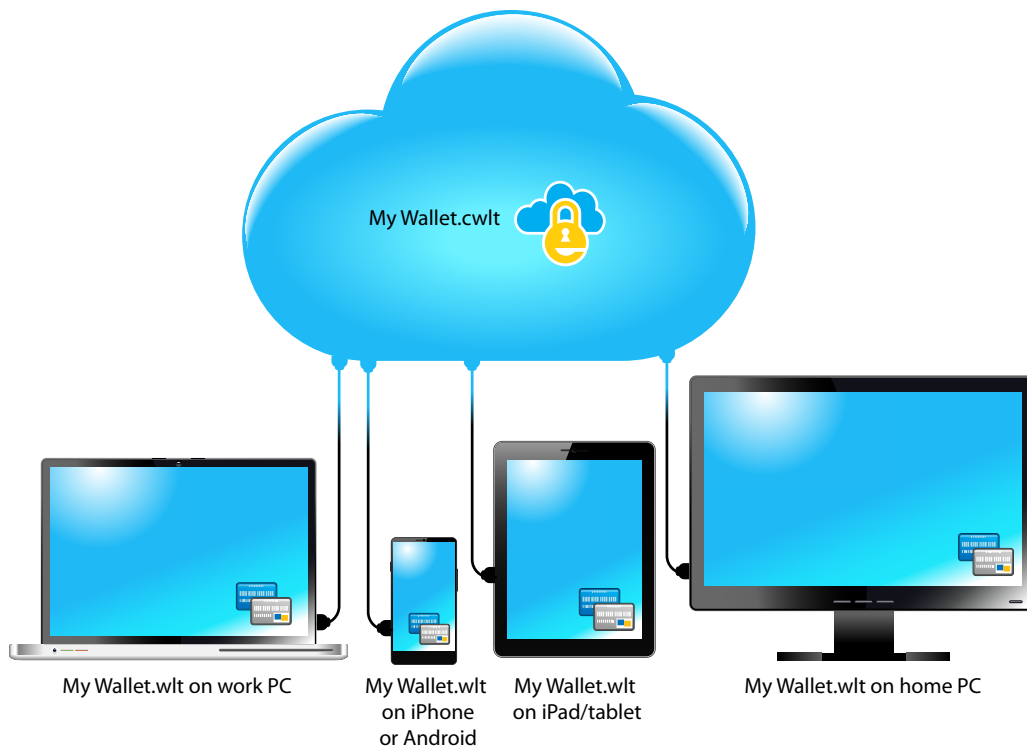
- **Networked Computer/disk:** \\<computer name>\<directory> (Example: \\central-comp\users\jim)
- **Removable Drive (Ex: USB):** <drive letter>:\<directory> (Example: E:\Files)
- **Local Folder:** <drive letter>:\<directory> (Example: C:\Documents & Settings\My Documents)
- **FTP Site:** ftp://<URL> (Example: ftp://ftp.foo.com)
- **FTP Site with Username and Password:** ftp://<username>:<password>@<URL> (Example: ftp://jimkirk:NCC1707@ftp.foo.com)
- **Secure FTP Site with Username and Password:** sftp://<username>:<password>@<URL> (Example: sftp://jimkirk:NCC1707@ftp.foo.com)

### 6.2.1. Hints & Tips

- You can only synchronize the data if you have write access to both locations. Otherwise, you will want to choose one of the Overwrite sync directions.
- Create a central wallet for multiple users by placing the master wallet in a read-only folder on the network and having each user synchronize with Sync Location overwrites Wallet.
- Synchronize data to a folder on the same Windows PC (or even better, another Mac or PC) is a way to easily make a backup of your information. Section 6.3, “Cloud Sync” (page 35) is another method of keeping a backup.
- Combine two wallets on the same Windows PC by giving them the same name and password, synching them to one another one time, and then removing the Sync Location.

## 6.3. Cloud Sync

eWallet's SyncPro engine on Windows PC has a cloud sync option. With cloud sync there is no need for a direct connection between devices to sync – and of course you can also use cloud sync as one method of creating backup files of your wallet and get it stored safely off-device and off-site.



Using the Cloud Sync option, the cloud version of your wallet file (.cwlt extension) can be considered the “master” version that can be used to keep devices with this feature up-to-date. Once you’ve configured your wallet to sync with the cloud, sync can pretty much happen automatically. There are two ways to do the initial setup: start with a cloud wallet or start with your local wallet (as outlined below).

### 6.3.1. Configuring Sync - Start with Cloud Wallet

1. Start eWallet and close/lock any wallet that might be open
2. Start the **Sync Manager** from the toolbar area
3. Press the **Dropbox** button
4. If necessary, enter any appropriate credentials and allow access to Dropbox; otherwise select your Sync Location and press **Next**
5. Select the cloud wallet that you want to sync with and toggle the button next to it to turn on sync for that wallet
6. Enter the password for the cloud wallet and press **OK**



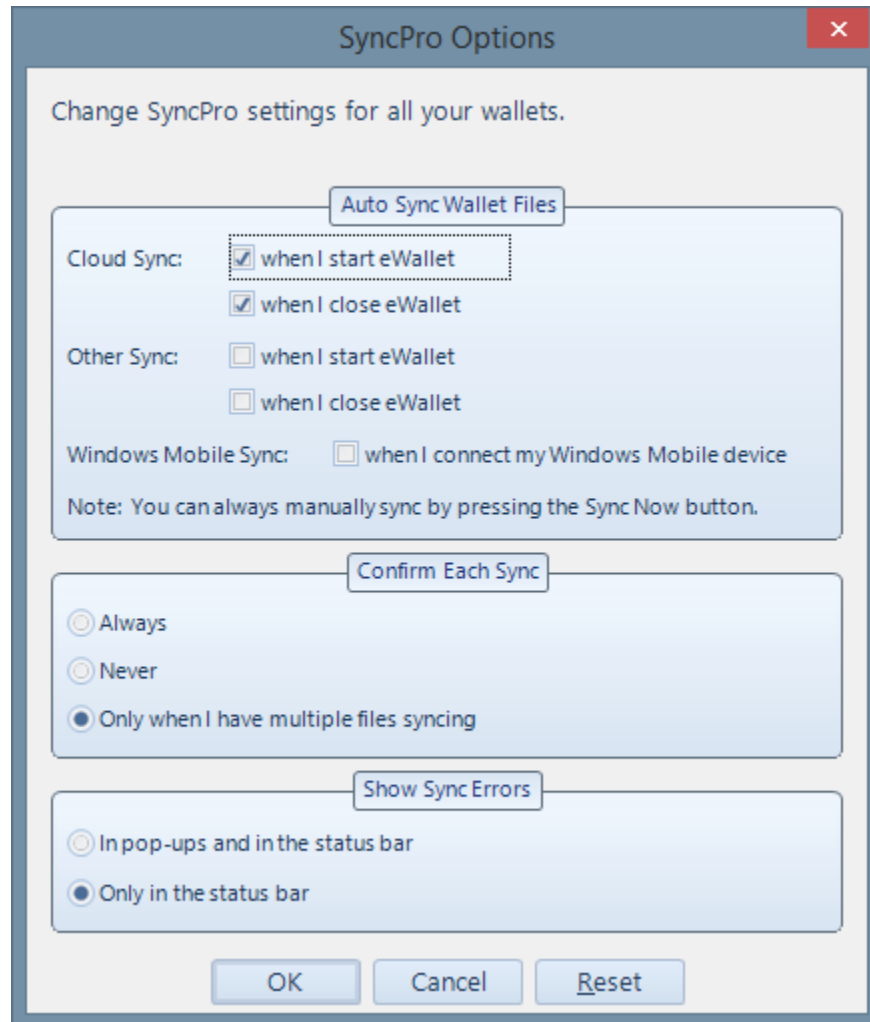
7. Press **Next** and the sync process will start

### 6.3.2. Configuring Sync - Start with Local Wallet

1. Start eWallet and open the local wallet you want to sync with
2. Start the **Sync Manager** from the toolbar area
3. If your Dropbox account **is not** listed as one of the Sync Locations:
  - a. Press **Add**
  - b. Select **Cloud Sync**
  - c. If necessary, enter any appropriate credentials and allow access to Dropbox; otherwise select your Sync Location and press **Next**
4. If your Dropbox account **is** listed as one of the Sync Locations:
  - a. Select the Dropbox Sync Location (the sync direction is likely "None" at this point)
  - b. Select **Edit**
  - c. Change the Sync Direction to "This wallet synchronizes with..." and press **OK**

### 6.3.3. Sync with Cloud Wallet

You should now be good to go! You can always sync your wallet by pressing the **Sync Now** button at the top of eWallet. By default, eWallet will automatically sync with your cloud wallet when you start eWallet and when you close it. The automatic syncing can be changed in the SyncPro Options panel, available from the **Sync Manager**.



## 6.4. Android Synchronization

eWallet offers full synchronization with your Android device using a local wireless network. Use SyncPro to quickly and easily synchronize as many wallets as you like directly with your mobile device. An alternative to this direct method is covered in Section 6.3, “Cloud Sync” (page 35).

The simplest way to set up synchronization with your Android device is to start eWallet on your device and then press the **Sync** button (a pair of circling arrows.) eWallet on the Android device will walk you through the entire process. The instructions below provide detailed information about the various steps in that process.

### 6.4.1. Android Wireless Sync Basics

The following is basic information and frequently asked questions that may help troubleshoot any problems you are having with synchronizing with your Android device.

- **Wireless Networks:** In order to synchronize eWallet on your Windows PC with eWallet on your Android device, both devices will have to be connected to the same wireless network. The Windows PC that you are using may be connected directly to the network (not wirelessly) but the Android device must connect wirelessly to use WiFi sync.
- **Ad Hoc Wireless Networks:** It is possible to synchronize your Android device to your Windows PC using an Ad Hoc Wireless Network. Ad Hoc Wireless Networks are temporary networks that allow two computers to communicate. For more information on creating an Ad Hoc Wireless Network, see the Windows documentation on your Windows PC.
- **Public Wireless Networks:** Although it is always safest to synchronize using a personal or Ad Hoc Wireless Network, it is possible to synchronize using some public networks. It is possible, however, that when synchronizing over a public network that someone might attempt to intercept files being transferred, including your wallet. As a result we *strongly recommend that you do not synchronize on public wireless networks.*
- **Bonjour:** To allow eWallet on the Windows PC to communicate with eWallet on your Android device, eWallet can make use of an optional piece of software from Apple called Bonjour. Typically, if you are using iTunes on your Windows PC you will already have Bonjour installed. If for any reason eWallet detects that you do not have Bonjour installed, it will notify you on the Windows PC and let you know where to go to obtain a free copy of Bonjour if you would like. Bonjour is an optional utility program designed specifically to coordinate communication between devices. It does not require any set up on your part and runs quietly in the background if needed. Bonjour never interacts directly with any of the data in your wallet or even with the wallet files themselves. The main advantage of using Bonjour with eWallet is that it lets you identify your Android device by name rather than having to use an IP address.
- **Creating a Partnership:** For your security, eWallet requires that you create a partnership with your Android device within the eWallet program on the Windows PC. This ensures that when you synchronize, your wallet is always synchronizing with the exact same computer you expect it to. If you wish to synchronize eWallet on your Android device with eWallet on other computers as well, you will need to create partnerships with eWallet on those computers as well. When you set up sync eWallet will walk you through this process, or you can refer to the instructions for creating partnerships below.
- **Synchronizing:** In order to create a partnership or synchronize with your Android device, you must activate sync on both your Windows PC and Android device. To activate sync on your Android device, simply press the **Sync** button (a pair of circling arrows) in eWallet on the device. To activate sync on the Windows PC, click the **Sync Now** button in the toolbar.

### 6.4.2. Create a Partnership

Before you can synchronize eWallet on the Windows PC with eWallet on your Android device, you must first create a partnership between the two devices in eWallet. This is a security measure that ensures that whenever you sync, your wallet is always synchronizing with the computer you think it is.

Follow the steps shown below to create a new partnership in eWallet between your Windows PC and your Android device.

1. On your Android device, start eWallet, press the **Sync** button (an icon with two circling arrows.)
2. Open eWallet on your Windows PC with the wallet you want to sync with\* and click the **Sync Manager** on the **Home** ribbon.

\*If you don't already have the wallet you want on your Windows PC (say you started with Android and the wallet is only on that device), then create a new, empty wallet (page 13) on your Windows PC making it the same file name (e.g., "My Wallet") and using the same password as what you have on your Android device.

3. In the **Sync Manager** window, click on the **Add** button.
4. Choose the **Device Sync** button, then click on the button that shows a picture of an Android device.
5. At the **Add Android Sync** window, select your device from the list provided and click **OK**.
6. At the **Enter Authorization Code** window, enter the five digit authorization code that now appears on your Android device, then click **Submit**.
7. When asked by the Windows PC version of eWallet if you want to Synchronize, click **Yes**.

### 6.4.3. Synchronize Your Wallet

Once you've created a partnership between your Android device and your Windows PC, you can synchronize your wallet whenever you need to. The key to synchronizing is that you must start sync on both your Windows PC and your Android device. Follow the steps below to synchronize your wallets.

1. On your Android device, start eWallet, press the **Sync** button (an icon with two circling arrows.)
2. Open eWallet on your Windows PC and click the **Sync Now** button on the toolbar.

Once you've completed these steps, eWallet will do the rest. If you are synchronizing more than one wallet you may be prompted on the Windows PC side about whether you want to sync some of the wallets or all of the wallets.

## 6.5. iOS Synchronization

eWallet offers full synchronization directly with your iOS device (iPad, iPhone and iPod touch) using a local wireless network. Use SyncPro to quickly and easily synchronize as many wallets as you like with your mobile device. An alternative to this direct method is covered in Section 6.3, “Cloud Sync” (page 35).

The simplest way to set up synchronization with your iOS device is to start eWallet on your device and then press the **Sync** button (a pair of circling arrows.) eWallet on the iOS device will walk you through the entire process. The instructions below provide detailed information about the various steps in that process.

### 6.5.1. iOS Sync Basics

The following is basic information and frequently asked questions that may help troubleshoot any problems you are having with synchronizing with your iOS device.

- **Wireless Networks:** In order to synchronize eWallet on your Windows PC with eWallet on your iPad, iPhone or iPod touch, both devices will have to be connected to the same wireless network. The Windows PC that you are using may be connected directly to the network (not wirelessly) but the iOS device must connect wirelessly. The reason for this is that Apple does not currently allow devices to talk to other computers and applications, via the USB cable.
- **Ad Hoc Wireless Networks:** It is possible to synchronize your iOS device to your Windows PC using an Ad Hoc Wireless Network. Ad Hoc Wireless Networks are temporary networks that allow two computers to communicate. For more information on creating an Ad Hoc Wireless Network, see the Windows documentation on your Windows PC.
- **Public Wireless Networks:** Although it is always safest to synchronize using a personal or Ad Hoc Wireless Network, it is possible to synchronize using some public networks. It is possible, however, that when synchronizing over a public network that someone might attempt to intercept files being transferred, including your wallet. As a result we *strongly recommend that you do not synchronize on public wireless networks.*
- **Bonjour:** To allow eWallet on the Windows PC to communicate with eWallet on your iOS device, eWallet makes use of a piece of software from Apple called Bonjour. Typically, if you are using iTunes on your Windows PC you will already have Bonjour installed. If for any reason eWallet detects that you do not have Bonjour installed, it will notify you on the Windows PC and let you know where to go to obtain a free copy of Bonjour. Bonjour is a utility program designed specifically to coordinate communication between devices. It does not require any set up on your part and runs quietly in the background if

needed. Bonjour never interacts directly with any of the data in your wallet or even with the wallet files themselves.

- **Creating a Partnership:** For your security, eWallet requires that you create a partnership with your iOS device within the eWallet program on the Windows PC. This ensures that when you synchronize, your wallet is always synchronizing with the exact same computer you expect it to. If you wish to synchronize eWallet on your iOS device with eWallet on other computers as well, you will need to create partnerships with eWallet on those computers as well. When you set up sync eWallet will walk you through this process, or you can refer to the instructions for creating partnerships below.
- **Synchronizing:** In order to create a partnership or synchronize with your iOS device, you must activate sync on both your Windows PC and iOS device. To activate sync on your iPhone, iPad, or iPod touch, simply touch the **Sync** button (a pair of circling arrows) in eWallet on the Apple device. To activate sync on the Windows PC, click the **Sync Now** button in the toolbar.

### 6.5.2. Create a Partnership

Before you can synchronize eWallet on the Windows PC with eWallet on your iOS device, you must first create a partnership between the two devices in eWallet. This is a security measure that ensures that whenever you sync, your wallet is always synchronizing with the computer you think it is.

Follow the steps shown below to create a new partnership in eWallet between your Windows PC and your iOS device.

1. On your iOS device, start eWallet and then press the **Sync** button (an icon with two circling arrows.)
2. Open eWallet on your Windows PC with the wallet you want to sync with\* and click the **Sync Manager** on the **Home** ribbon.

\*If you don't already have the wallet you want on your Windows PC (say you started with your iPhone and the wallet is only on that device), then create a new, empty wallet (page 13) on your Windows PC making it the same file name (e.g., "My Wallet") and using the same password as what you have on your iOS device.

3. In the **Sync Manager** window, click on the **Add** button.
4. Choose the **Device Sync** button, then click on the button that shows a picture of an iPad and iPhone.
5. At the **Add iPhone, iPad or iPod touch Sync** window, select your device from the list provided and click **OK**.

6. At the **Enter Authorization Code** window, enter the five digit authorization code that now appears on your iOS device, then click **Submit**.
7. When asked by the Windows PC version of eWallet if you want to Synchronize, click **Yes**.

### 6.5.3. Synchronize Your Wallet

Once you've created a partnership between your iOS device and your Windows PC, you can synchronize your wallet whenever you need to. The key to synchronizing is that you must start sync on both your Windows PC and your iOS device. Follow the steps below to synchronize your wallets.

1. On your iPad, iPhone or iPod touch, start eWallet and then press the **Sync** button (an icon with two circling arrows.)
2. Open eWallet on your Windows PC and click the **Sync Now** button on the toolbar.

Once you've completed these steps, eWallet will do the rest. If you are synchronizing more than one wallet you may be prompted on the Windows PC side about whether you want to sync some of the wallets or all of the wallets.

## 6.6. SyncPro Options

You can control when SyncPro synchronization occurs and if you want to confirm each synchronization. Note that SyncPro will check all your SyncPro wallets when synchronization occurs but will only synchronize the wallets that need it.

Synchronization Occurs:

|                                 |  |
|---------------------------------|--|
| When I start eWallet            | SyncPro synchronization will occur for (locations that don't require interaction) whenever eWallet on the Windows PC starts.         |
| When I close eWallet            | SyncPro synchronization will occur (locations that don't require interaction) when eWallet on the Windows PC is exited.              |
| When I connect my mobile device | SyncPro synchronization will occur whenever a Windows Mobile device is connected via ActiveSync or the Windows Mobile Device Center. |

Confirmation:

|        |   |
|--------|---|
| Always | Always prompt for confirmation before SyncPro runs. |
| Never  | Never prompt for confirmation before SyncPro runs.  |

|   |  |
|---|--|
| Only when I have multiple files synchronizing | Select this confirmation option to prompt for confirmation if you have more than one wallet file to be synchronized. |
|---|--|

Sync Errors:

|                                  |   |
|----------------------------------|---|
| In pop-ups and in the status bar | With this option selected, a sync error will notify you with a message that must be dismissed (there will be an indication of the error in the status bar as well). |
| Only in the status bar           | This option is a bit more subtle; the sync error will only be referenced in the status bar.   |

## 6.7. File Synchronization

If you have a Windows Mobile Professional (touch) device, you can use **File Synchronization** (part of Mobile Device Center on Windows 7 and 8) as an optional alternative to SyncPro to keep the wallet files on your Windows PC in sync with the wallet files on your Windows Mobile (touch) device.

We **strongly recommend using SyncPro** rather than File Synchronization. Although File Synchronization has its uses, SyncPro does a much better job of making sure that all of your changes get saved. Only use File Synchronization if you cannot use SyncPro.

To set up your Windows PC and mobile device for File Synchronization, follow these steps:

- Enable File Synchronization. In the Windows Mobile Device Center on Windows 7 or 8, you can turn on File Synchronization from the Mobile Device Settings. Select Change Content Sync Settings and then check the box for Files and click the **Save** button.
- Store your wallet files in the My Documents folder on your Windows Mobile (touch) device (which is the default location for wallet files) or on your desktop store the wallet file in the <devicename> My Documents folder, where <devicename> is the name of your device.

When you synchronize your device using ActiveSync or the Windows Mobile Device Center's File Synchronization, the wallets are compared and the wallet with the most recent date replaces the wallet with the oldest date. Please note that File Sync cannot combine data the way SyncPro does. It simply keeps the most recent version of your wallet file and copies that over the oldest version. For this reason, we strongly recommend that you use SyncPro rather than File Sync.

Once you have this set up, your wallet files will be synchronized whenever you synchronize your device using ActiveSync or the Windows Mobile Device Center. If eWallet is running when you synchronize, you may get a message that the wallet file is in use. If this happens, lock your wallet file and synchronize again.



If you don't want a Windows PC wallet file synchronized with your mobile device any longer, simply move the file out of the <devicename> My Documents folder on your Windows PC and out of the My Documents folder on your Windows Mobile (touch) device. In ActiveSync, you can find out where this folder is by opening the **ActiveSync Options** dialog, selecting **File Synchronization** and clicking the **Options** or **Settings** button.

*Note that Microsoft does not provide File Synchronization for versions of Windows Mobile Standard (non-touch) devices. You will need to use SyncPro to synchronize information with your Windows Mobile (non-touch) device.*

To switch from File Sync to SyncPro, just follow the Synchronization instructions for setting up SyncPro for that wallet on the desktop. eWallet will handle the rest.



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## Chapter 7. More eWallet Features

### Backups

For extra safety, we encourage you to make backups of your eWallet files (as well as all of your important information). These backups, like backups of any of your other important files, should be saved somewhere offsite on a reliable media.

eWallet also has an *automatic backup copies* feature that will make a copy of your wallet after you close it and can keep a number of these copies around in case you need them. A good example of using this feature is if you recently deleted a card you didn't mean to; in that case you might find the card in one of these copies. This feature is a convenience though and not meant to replace doing a real backup as described earlier. The copies are stored in:

`%APPDATA%\Ilium Software\eWallet\Wallet Backups`

You can also make a backup copy manually. On a Windows PC, select **Save As...** from the eWallet **File** menu and choose **eWallet File** for the format.

### Search

In eWallet on you can use the Search or Find feature to search all of the cards in a wallet for a particular piece of information. Search will return results as you type, returning the name of the card as well as its category.

### Smart Copy

You can right-click on a value on your card or in the Details pane and then use **Copy <field name>** to copy that value to the clipboard.

When you use the **Copy <field name>** command on a credit card's card number, only the digits will be copied to the clipboard. Spaces and dashes are removed using this copy command to make pasting to forms on web sites easier.

### Recent Cards

Clicking the **Recent Cards** button . below the list of cards is a handy way to show you the list of cards you've recently accessed, sorted with most recent at the top.

### Printing

You can *print* your wallet from your Windows PC using eWallet's **Print** menu selections in the eWallet **File/Start** menu. You can print your entire wallet or a selection of cards.

## Export

You can *export* your eWallet information to a text file from eWallet by using **Save As...** a text file on a Windows PC for printing or extra backup. This will copy all the information on each card in your wallet to the file you specify. Please note that exported information is not secure, and that any colors, graphics and attached files associated with a card are not exported. Also, it is not possible to import this data back into eWallet. See the instructions for Making a Backup for ways to backup the actual wallet file.

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# Appendix A. Customer and Technical Support

## A.1. How to Contact Ilium Software

### Information and Sales

For Technical or Customer Support, Sales or general queries, please visit our web site.  
If you have a question, the best way to reach us is via the contact information below.

### Support

For Technical or Customer Support, visit our [Support](http://www.iliumsoft.com/support)<sup>1</sup> area, or reach us using the contact information below.

### Contact Information

|        |   |
|--------|---|
| Web:   | Use our secure web server at <a href="http://www.iliumsoft.com">www.iliumsoft.com</a> |
| Email: | <a href="http://www.iliumsoft.com/contactus">www.iliumsoft.com/contactus</a>          |
| Mail:  | <b>Ilium Software</b><br>3759 Prospect Rd.<br>Ann Arbor, MI 48105 USA                 |



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<sup>1</sup> <http://www.iliumsoft.com/support>



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